

Concur Travel Guide

Trainings and Support for Concur

The links provided below have training guides and resources you can access if you have any questions regarding Concur or need help trouble shooting.

[Concur User Support](#)

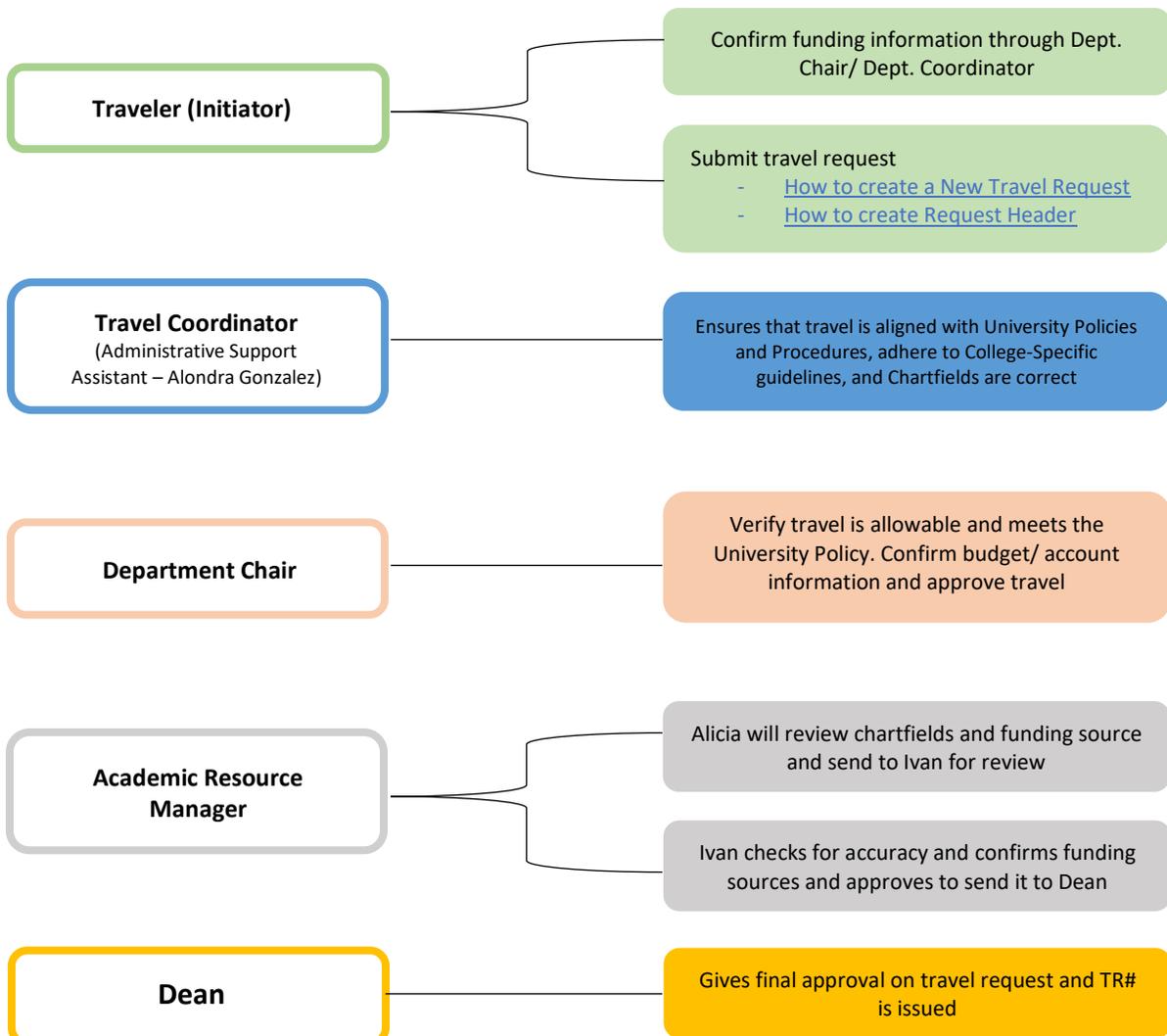
[Concur Trainings](#)

[Concur Video Channel](#)

24/7 Help Line for User Support: 866-793-4040

Approval Workflow for Travel Requests

College Concur Workflow for Travel Pre-Approval



Travel Requests

1. Login to Concur using your CSUF credentials
 - a. [Logging into Concur](#)
2. Create a new travel request
 - a. Go to Concur dashboard and click “Requests”, Click “Create New Request”, and complete the request header
 - i. [How to create a New Travel Request](#)
 - ii. [How to create Request Header](#)
 - Request Header Format should be “MMM YEAR CITY, STATE”
 - EX: AUG 2022 Sacramento, CA
 - b. Once you have created your request you can begin filling out the travel information.
 - i. For the section titled “How will you book your travel” please be sure to select “Outside of Concur”
 - ii. If you are including personal dates, please include that in the “Personal Dates” section of the request
 - Please fill out “# of personal days”, “personal dates and locations”
 - iii. “Division” and “Department ID” will automatically be filled out for you. Please make sure the funding matches the funding you will be using for your request.
 - **If you do not know your account information, please reach out to your department chair or department coordinator.**

****If using Dean’s Travel Award to fully fund your trip you will have to change the account information at the request header level to the following funding: 10370 THEFD 5278 ****

1. You will need to change the “Department ID” to **10370 (Ed Doctorate)** and input **5278** in the “Program” section
 2. You can then click “Save”
 3. Your expenses will automatically be charged to the Dean’s Travel Award once you have added all your expected expenses
- **If you are using the Dean’s Travel Award, please be sure to submit your APA Citation in the “Comments” box****
- request will be considered incomplete without this and will be sent back to you.
- iv. Once all sections have been filled out you can click “Create Request”
- c. You can now begin to add expenses to your travel request
 - i. [Travel Request Navigation](#)
 - ii. Click “Add” and scroll through list of expenses and select the expense you are looking for

- iii. Fill out the “Date”, “City”, “Detail” “Amount” and “Currency” sections
 - iv. Once all sections have been filled out click on “Save”
- d. [Adding Expenses to Travel Request](#)

****Concur only accepts stateside funding. If your trip is fully funded by ASC or Philanthropic funds you will continue to use the old form process****

****If using split funding that is stateside you will have to allocate each expense to the different funding accounts you will be using****

EX: You are using \$1000 from the Dean’s Travel Award and \$500 from startup funds. You will need to allocate each expense to the different funding accounts.

- To allocated expenses follow the steps below:
 - 4. Click on the box on the left-hand side next to the expense and check it off
 - 5. Click on “Allocate” button below “Expected Expenses”
 - 6. Select “Add” and from here you will be able to edit the funding
 - 7. You can change the “Department ID” and add “Class” or “Program” codes depending on which account you will be using.
 - 8. You can then click “Update” and “Save”
 - 9. The allocation will update, and you will see “Allocated” next to each expense
- [How to Allocate Travel Expenses](#)

NOTE: If funding is Auxiliary funding, you will not be able to make those changes in the travel request. You will need to wait until after the trip to complete the travel expense report.

**** If using split funding that is stateside and ASC or Philanthropic funds you will only include the stateside funding on the request. You will have to submit a separate request outside of Concur for the ASC or Philanthropic funds using the old paper form method****

**** If expenses exceed the approved amount for the total cost of your travel request you will have to make an adjustment in the expenses section ****

- You will need to add an expense under the “other” category and click “adjustment”
- You will fill out the “Transaction Amount” with the amount your expenses have gone over
 - o EX: Dean’s Travel Award is \$2,000 but the request has come out to \$2,500
 - You will put -500 in the transaction amount
- You can add a comment that says, “Cannot exceed (AMOUNT)” and click save

- The page will refresh, and you will see the new estimated amount adjusted on your request
 - [How to Adjust Expenses with Amount Not to Exceed](#)
3. Once you have created your request and added expenses you will need to upload the following forms into Concur:
 - a. Conference flyer or agenda
 - b. Proof of presentation (if using Dean's Travel Award)
 - i. Please include APA citation in the notes section of Concur (must be included for request to be complete)
 - c. Conference registration rates
 - d. [How to upload Travel Request Attachments](#)
 4. Once you finish adding expenses and review your request you can now submit for approval.
 5. Travel Coordinator will review to ensure all forms and information is correct. If request needs to be edited, you will be notified. Once request is ready, travel coordinator will indicate the request is ready for dept. chair review/approval.
 6. The request will then move through the college workflow.
 7. Once it has been approved you will receive your TR number and can begin booking your trip.

Directions for Department Chairs

1. Once you have received your faculty's travel request please do not approve until Alondra has reviewed it.
 - a. Alondra will review and she will leave a note in the comment section and notify you it is ready for review/ approval

Travel Expense Claims

1. You must create your expense claim 7 days after returning from your trip.
2. Login to Concur using your CSUF credentials
 - a. [Logging into Concur](#)
3. Click on “Requests” tab and find the request you would like to create an expense report for and click it
4. Once it loads click on the “Create Expense Report” button in the upper right
 - i. Click on “report Details” and scroll down to “Report Header”
 - You will need to manually fill in “start time”, “main destination city” and “end time”
 - Once you have filled out all the fields click the “Save” button
5. Your page will refresh, and your expense report has now been created with your travel request already linked
 - a. [How to Create an Expense Report Through Travel Requests](#)

****If using Dean’s Travel Award to fully fund your trip you will have to change the account information at the report header to the following funding: 10370 THEFD 5278 ****

1. You will need to change the “Department ID” to **10370 (Ed Doctorate)** and input **5278** in the “Program” section
 2. You can then click “Save”
 3. Your expenses will automatically be charged to the Dean’s Travel Award once you have added all your expected expenses
6. If you have an approved travel request that is not in concur you will still create an expense report in Concur.
 - a. [Creating Expense Report for Paper Travel Request](#)
 - b. After creating the report, you can start adding expenses and uploading all travel receipts.
7. Once you finish adding expenses/itemizing and review your request you can now submit for approval.
8. The travel coordinator will review to ensure all information is correct and will indicate if request is ready to be approved or to request changes.